



California Department of Community Services and Development

2017 Cal EITC Education and Outreach Grant

Bidders Conference

Tuesday, August 15, 2017

Today's Presenters

Sukie Montes,
Community Services Division
Program Development Unit Manager

Adam Gosney
Associate Governmental Program Analyst

Moneshia Campus
Associate Governmental Program Analyst

How to Ask Questions on Bidder's Conference

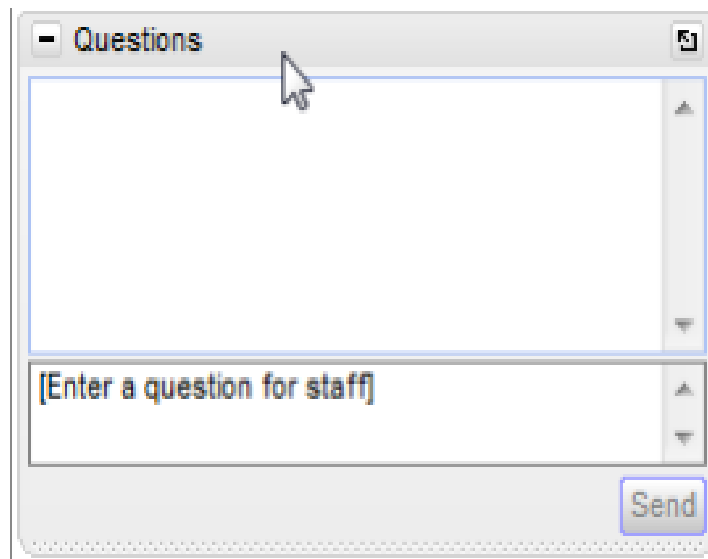
1) Typing Questions In

Questions

If you have any questions during a webinar, you can enter your questions into the Questions pane for the organizer or panelists to answer.

1. Type your question into the Questions pane and click **Send**.

The organizer can choose to answer the question themselves or to assign the question to panelists to answer.



We encourage attendees to ask questions using this option

How to Ask Questions on Bidder's Conference

2) Asking Questions Over the Phone

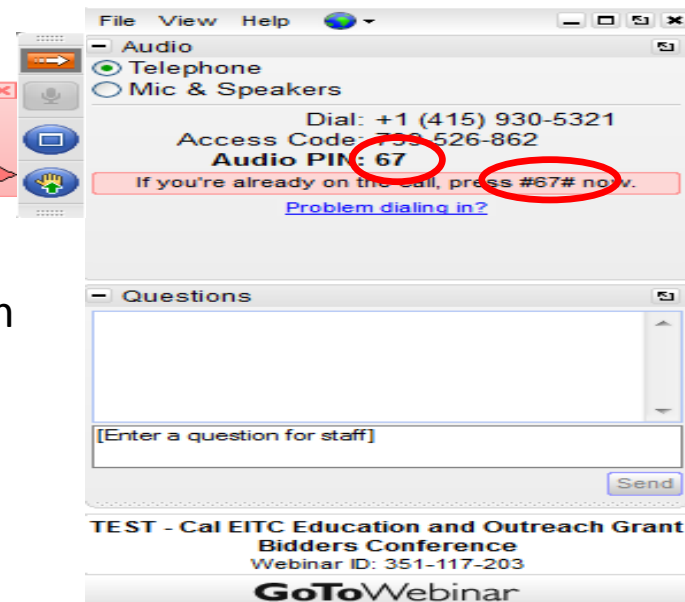
1) Raise Hand



If attendees would like to ask a question, please click the little hand feature. This will enable us to unmute you and allow you to speak. To ask your question(s).*

To enable muting controls, please enter your PIN on your telephone keypad now.

Audio PIN: **#67#**



*Remember you need to enter audio pin upon dialing in in order to enable audio controls/allow use to hear you.

2) CSD will unmute you and you may ask your question

AGENDA

- Overview of Department of Community Services and Development
- Earned Income Tax Credit (EITC) Background
- Purpose of the Notice of Funding Availability (NOFA)
- Targeting
- Education and Outreach Grant Activities
- Available Funding and Target Areas
- Grant Requirements
- Notice of Intent to Apply
- Application Package
- Review Process
- Projected Timeline
- Questions



Department of Community Services and Development (CSD)

Mission

CSD reduces poverty for Californians.

Vision

CSD lead the development and coordination of effective and innovative programs for low-income Californians.

-- Partners Against Poverty! --

www.csd.ca.gov

EITC Background

- **Federal EITC:** Refundable cashback tax credit for low-to-moderate income working individuals and families earning \$53,267 per year or less. EITC reduces tax liability and then issues any unused credits as a cashback refund when a tax return is filed.
- **State EITC:** The California Earned Income Tax Credit (Cal EITC) supplements the federal EITC. Cal EITC helps working individuals and families earning less than \$14,161. A tax return must be filed to claim the credit.

Purpose of the Notice of Funding Availability (NOFA)

- Increase awareness of the EITC and Volunteer Income Tax Assistance (VITA) program among low-income eligible individuals and families
- Support Cal EITC education and outreach activities
 - Funding will support new or expansion activities.

Definitions

Cal EITC Education: Information provided to eligible populations about the program, such as, but not limited to: the purpose, benefits, eligibility criteria, where to go, how to claim the credit at no cost and how to claim past years credits with the goal of increasing the number of eligible California residents claiming the credit.

Federal EITC Education: Information provided to eligible populations about the program, such as, but not limited to: the purpose, benefits, eligibility criteria, where to go, how to claim the credit at no cost and how to claim past years credits.

Cal EITC Outreach: Activities (like canvassing) intended to increase the number of eligible California residents claiming the credit.

Targeting

Income Eligibility

- Tax Season 2016 - \$14,161

Changes to Cal EITC Eligibility for Tax Season 2017

- Self-Employed
- Incomes Up to \$22,300

<http://calbudgetcenter.org/resources/expanded-caleitc-major-advance-working-families/>

Targeting

Messaging

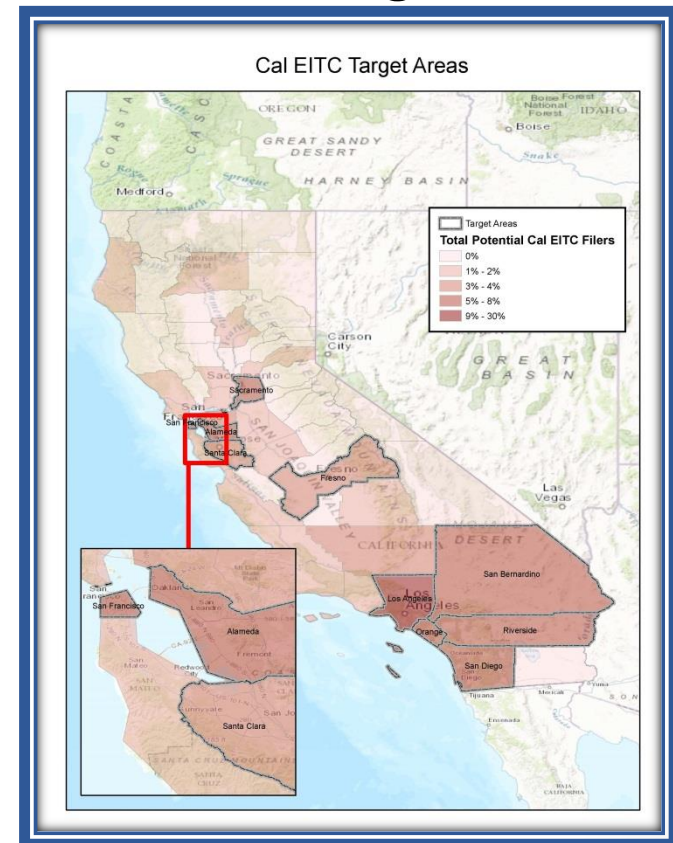
- Availability of state EITC
- Availability of federal EITC
- Free Tax Preparation – VITA
- Californians who have never claimed the EITC
- Self-employed workers newly eligible for the Cal EITC
- Workers with incomes up to \$22,300 newly eligible for the Cal EITC
- Californians whose low income does not require them to file taxes
- Where to get more information

Targeting

Geographic Area – areas identified as having the highest proportion of eligible California residents not claiming the credit.

- Target Areas 1 – 10: Top 10 Counties

Target Area	Top 10 Counties
1	Los Angeles
2	San Diego
3	Orange
4	Riverside
5	San Bernardino
6	Sacramento
7	Alameda
8	San Francisco
9	Santa Clara
10	Fresno



Targeting

- Target Area 11: Rural Counties

Target Area 11	Allotment By Area	Anticipated # of Grants	Contract Award
Rural Counties	\$110,000	1	\$110,000

- Target Area 12: Statewide

Target Area 12	Allotment By Area	Anticipated # of Grants	Contract Award Ranges
Statewide	\$410,000	1 – 2	\$230,000 - \$410,000

Targeting

IDENTIFYING CHARACTERISTICS: Focus of outreach may include the following common characteristics identified in Table II below.

Table II: Characteristics of Those Failing To Claim
Areas with high concentration of Hispanics
Individuals with lower incomes than required to file a tax return
Parents (particularly mothers) of Children of Color
Individuals participating in Cal Fresh /Supplemental Nutrition Assistance Program (SNAP)
Individuals without qualifying children
Populations with Limited-English Proficiency
Culturally diverse populations and communities

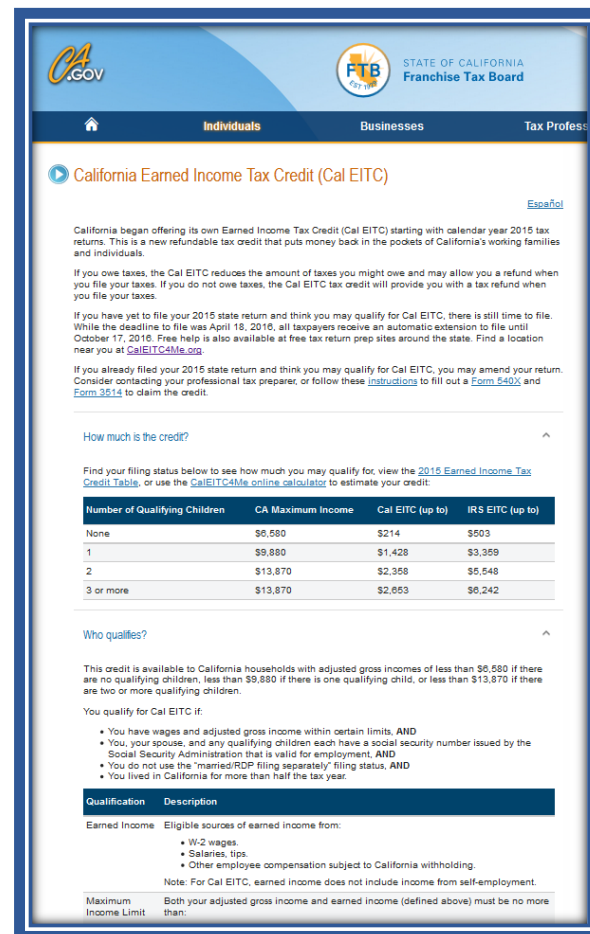
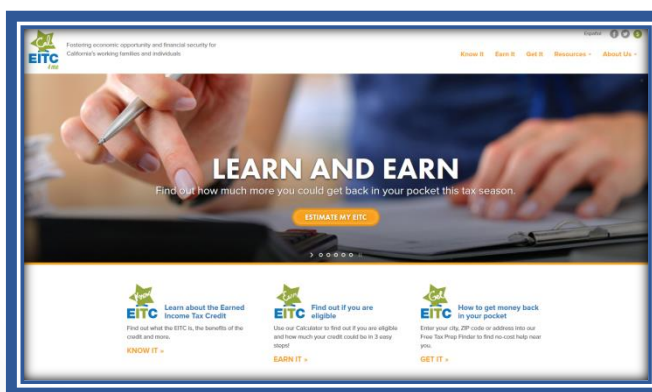
- Californians who have never claimed the EITC

Education & Outreach Activities

Required for Target Areas 1 through 10	Required for Target Areas 11 and 12	Activity
X	X	Web
X	X	Social Media
X		Canvassing
		Media
		Collateral Messaging
		Group Events
		Other(s)

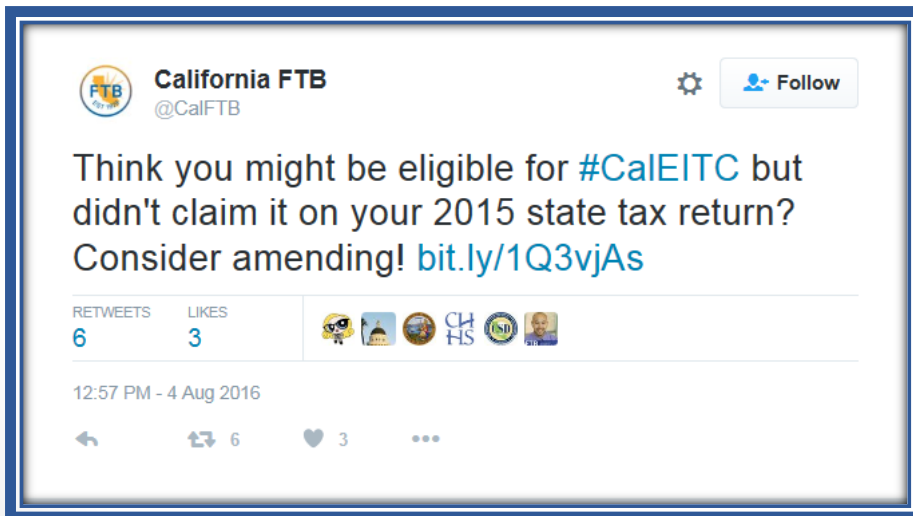
Required Outreach Activities

Web



Required Outreach Activities

Social Media



Required Outreach Activities



Canvassing



Recommended Outreach Activities

CSD recommends utilizing various types of outreach to ensure diverse, eligible low-income populations are being reached. Outreach activities may include:

- Media
- Collateral Messaging
- Group Events
- Other

Media



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1-800-XXX-XXXX
dcba.lacounty.gov

File your Tax Return and get
Cash Back Tax Credits – It's FREE money!

FREE TAX\$ PREP
LOS ANGELES

File your tax return and put money back in your pocket with cash back tax credits. It's yours to claim. If you make less than \$54,000, you may be eligible for free tax services by IRS-trained tax preparers in your neighborhood. File on or before Tuesday, April 18, 2017. Find out if you qualify at www.dcba.lacounty.gov

 dcba.lacounty.gov
[#FreeTaxPrepLA](https://twitter.com/FreeTaxPrepLA)



1 IN 3 CALIFORNIANS
STRUGGLE TO GET BY.
**THE NEW
CALIFORNIA
EARNED INCOME
TAX CREDIT**
PUTS MONEY
IN THE POCKETS OF
WORKING FAMILIES.

**UNITED WAYS
CAN HELP**



Collateral Messaging

Critical EITC and eligibility information is available through:

Franchise Tax Board

<https://www.ftb.ca.gov/individuals/faq/net/900.shtml>

Internal Revenue Service <https://www.eitc.irs.gov/>

CalEITC4Me <http://caleitc4me.org>

Group Events

May include:

- Mega events
- Bus tours
- Educational forums
- Local, Free Tax preparation and Filing Services, such as VITA sites
- Libraries
- Food banks
- Places of religious worship
- Health care clinics
- Schools
- Etc.

Q & A

Available Funding

Geography	Funding Allotment
Top 10 Counties	\$1,480,000
Rural Counties	\$110,000
Statewide	\$410,000
Total	\$2,000,000

CSD anticipates awarding approximately 13 to 14 grants.

Target Areas 1-10: Top 10

Target Area	Top 10 Counties	Allotment By County	Anticipated # of Grants	Contract Award
1	Los Angeles	\$600,000	2	\$300,000
2	San Diego	\$170,000	1	\$170,000
3	Orange	\$110,000	1	\$110,000
4	Riverside	\$100,000	1	\$100,000
5	San Bernardino	\$100,000	1	\$100,000
6	Sacramento	\$90,000	1	\$90,000
7	Alameda	\$90,000	1	\$90,000
8	San Francisco	\$80,000	1	\$80,000
9	Santa Clara	\$70,000	1	\$70,000
10	Fresno	\$70,000	1	\$70,000
Top 10 Total		\$1,480,000	Up to 11	N/A

Where in NOFA: Pages 8-10

Target Area 11: Rural Counties

Target Area 11	Allotment By Area	Anticipated # of Grants	Contract Award
Rural Counties	\$110,000	1	\$110,000

Target Area 12: Statewide

Target Area 12	Allotment By Area	Anticipated # of Grants	Contract Award Ranges
Statewide	\$410,000	1 – 2	\$230,000 - \$410,000

Applications

- Applicants may apply for more than one target area, and for more than one of the top 10 counties.
- Applicants must submit a **separate** application for each target area to receive funding.

Q & A

Inappropriate Use of Funds

- Funds *cannot* be used to supplant existing federal, state, or private funds allocated to conduct the same or similar work.
- Funds may not be used for any political or legislative advocacy work, nor to promote organizations, names, or etc. of grantees.
- Costs are to be allocated for outreach and education activities and are not intended to support organizational overhead. Considering the limited amount of grant funds available, applicants should make every effort possible to minimize overhead/administrative costs and target available funding towards providing direct services for eligible Californians.

Grant Requirements

- Funds must be spent in a manner that serves the intended purpose of providing EITC education and outreach to eligible California residents
- Funds must be used for cost effective education and outreach activities having a measurable outcome that is trackable
- Cost sharing or matching funds must be at least 50 percent
- Submission of **all** Application Packet Documents.
- Conduct activities and messaging at minimum in both English and Spanish
- Grantees must work together to optimize education and outreach efforts for overlapping taxpayers or geographic areas
- Possess insurance by the start of the contract term.
- Adhere to all state laws and regulations

Eligibility Requirements

- Tax exempt organization or local government entity including:
 - Private, non-profit or public organization
 - local government agency (state agencies are ineligible for funding)
 - Federally recognized Indian Tribal Government
- Eligible to receive public funds (<https://www.sam.gov>)
- Be in Good Standing with federal and state administering grant issuing agencies

Minimum Qualifications

Applicants must demonstrate:

- Knowledge of the Cal EITC and VITA;
- Three (3) years of experience successfully providing, coordinating and implementing education and outreach activities that serve low-income populations;
- Established and trusted relationships with community partners serving low-income populations, preferably with partners who have extensive EITC and tax preparation experience;
- Capacity to implement and deliver all elements of the proposed activities described in the narrative response to this application;
- Ability to provide education and outreach activities appropriate to the language and culture of the targeted population; and
- Ability to collect and report reliable, valid, and timely data monthly for all proposed activities.

Q & A

Notice of Intent to Apply

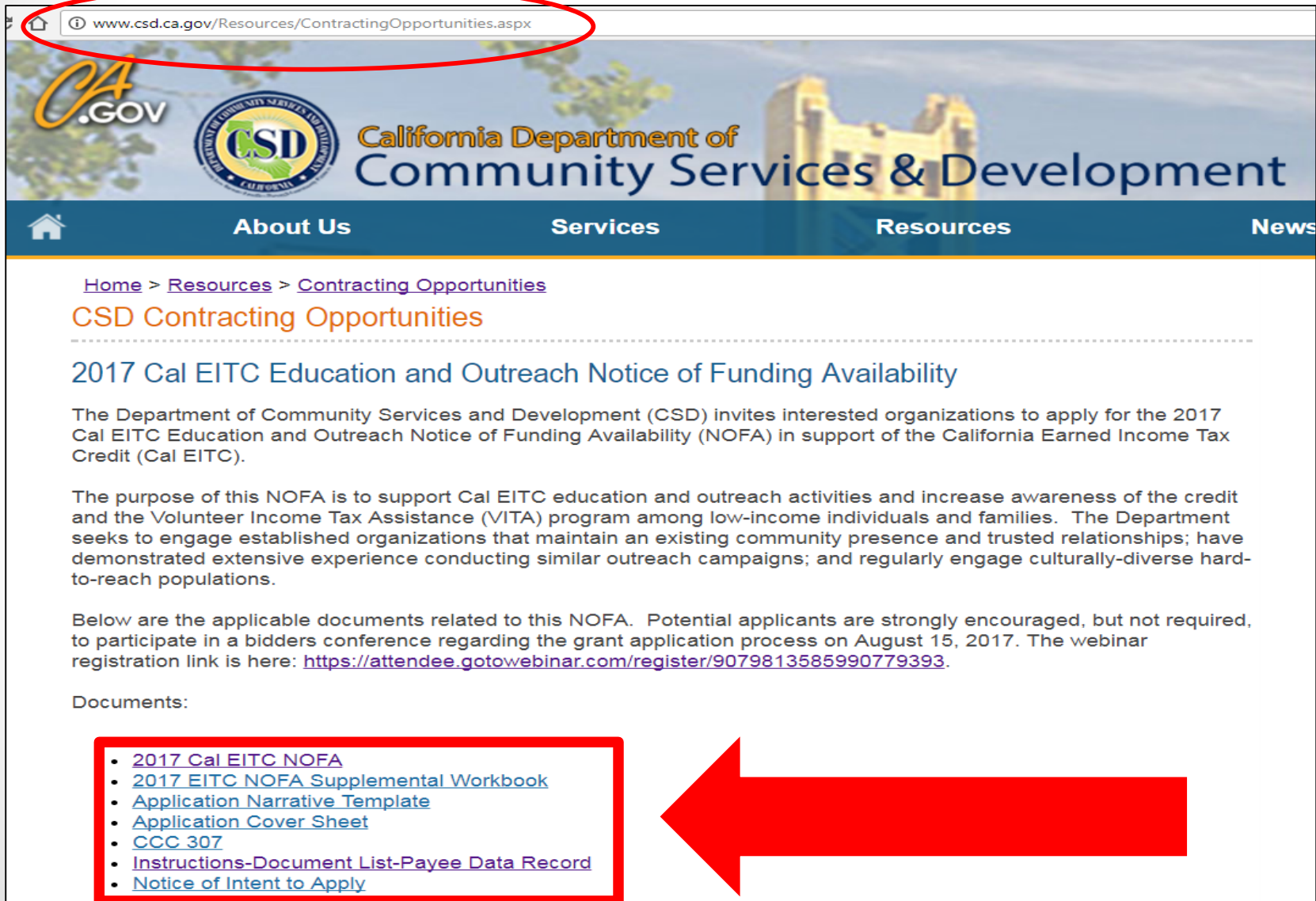
2017-Cal EITC NOFA	
Department of Community Services and Development	
Notice of Intent to Apply	
<p>Instructions: Submit this Notice of Intent to Apply via mail, in-person delivery or email, no later than 5:00 p.m. on August 22, 2017. Applicants wishing to make their Notice of Intent to Apply public for collaboration may do so by indicating below. The public list will be posted and updated periodically to the CSD public website at http://www.csd.ca.gov/Resources/ContractingOpportunities.aspx.</p>	
<p>Submit by mail or deliver in-person to: Department of Community Services and Development Attn: Program Development Unit, 2017 Cal EITC NOFA 2389 Gateway Oaks Drive, Ste. 100 Sacramento, CA 95833</p>	
<p>Submit by email to: CSBGDIV@CSD.CA.GOV</p>	
Use the following subject line: 2017 Cal EITC NOFA	
Organization	
Address:	
City:	Zip
Phone:	
Email:	
Target Area(s): (Check all target areas you plan to apply for)	<input type="checkbox"/> Target Area 1: Los Angeles <input type="checkbox"/> Target Area 7: Alameda <input type="checkbox"/> Target Area 2: San Diego <input type="checkbox"/> Target Area 8: San Francisco <input type="checkbox"/> Target Area 3: Orange <input type="checkbox"/> Target Area 9: Santa Clara <input type="checkbox"/> Target Area 4: Riverside <input type="checkbox"/> Target Area 10: Fresno <input type="checkbox"/> Target Area 5: San Bernardino <input type="checkbox"/> Target Area 11: Rural Counties <input type="checkbox"/> Target Area 6: Sacramento <input type="checkbox"/> Target Area 12: Statewide
Signature of Designated Person (Executive Director or Chief Executive Officer)	
Print Name and Title:	
Publicly Disclose?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Where Find NOI: <http://www.csd.ca.gov/Resources/ContractingOpportunities.aspx>

Application Package

Order	Title	File Name
N/A	Application Packet Instructions and Document List (do not return with application)	ApplicationPacketInstructions.pdf
1	Application Cover Sheet (CSD 171 Cover Sheet)	ApplicationCoverSheet.docx
2	Application Narrative Template (20 <u>page limit</u>) (CSD 171ANT)	ApplicationNarrativeTemplate.docx
3	Scope of Work (CSD 171)	NOFASupplementalWorkbook.xlsx
4	Budget Forms <ul style="list-style-type: none"> Budget Summary CSD 171A Budget Detail CSD 171B 	
5	Timeline (CSD 171TL)	
6	Matching Funds Worksheet (CSD 171MF)	
7	Subcontractor Information Worksheet (CSD 171SI)	
8	References Worksheet (CSD 171Ref)	
9	Payee Data Record (STD 204)	PayeeDataRecord.pdf
10	Contractor Certification Clauses Form (CCC-307)	CCC307.pdf

Application Package



www.csd.ca.gov/Resources/ContractingOpportunities.aspx

CA.GOV **CSD** California Department of Community Services & Development

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CSD Contracting Opportunities

2017 Cal EITC Education and Outreach Notice of Funding Availability

The Department of Community Services and Development (CSD) invites interested organizations to apply for the 2017 Cal EITC Education and Outreach Notice of Funding Availability (NOFA) in support of the California Earned Income Tax Credit (Cal EITC).

The purpose of this NOFA is to support Cal EITC education and outreach activities and increase awareness of the credit and the Volunteer Income Tax Assistance (VITA) program among low-income individuals and families. The Department seeks to engage established organizations that maintain an existing community presence and trusted relationships; have demonstrated extensive experience conducting similar outreach campaigns; and regularly engage culturally-diverse hard-to-reach populations.

Below are the applicable documents related to this NOFA. Potential applicants are strongly encouraged, but not required, to participate in a bidders conference regarding the grant application process on August 15, 2017. The webinar registration link is here: <https://attendee.gotowebinar.com/register/9079813585990779393>.

Documents:

- [2017 Cal EITC NOFA](#)
- [2017 EITC NOFA Supplemental Workbook](#)
- [Application Narrative Template](#)
- [Application Cover Sheet](#)
- [CCC 307](#)
- [Instructions-Documents List-Payee Data Record](#)
- [Notice of Intent to Apply](#)

Application Cover Sheet

State of California
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT
Cal EITC Outreach and Education Application Cover Sheet
CSD 171CoverSheet (Rev. 7/10/17)

Cal EITC Education and Outreach Grant Application Cover Sheet

Note: The cover sheet is not a scored element of the application but is a requirement

APPLICANT INFORMATION	
APPLICANT NAME:	
FUNDING AMOUNT REQUESTED:	\$
TARGET AREA (If Target Area 11 list all counties to be served):	
TYPE OF TAX EXEMPT ENTITY:	
<input type="checkbox"/> PRIVATE NON-PROFIT <input type="checkbox"/> LOCAL PUBLIC ENTITY (STATE AGENCIES INELIGIBLE) <input type="checkbox"/> FEDERALLY RECOGNIZED INDIAN TRIBAL GOVERNMENT	
TAX PAYER ID#:	
PHYSICAL MAILING ADDRESS:	
NAME OF EXECUTIVE DIRECTOR / CHIEF EXECUTIVE OFFICER:	
PHONE NUMBER:	
EMAIL ADDRESS:	
POINT OF CONTACT (PPC) NAME	
PPC PHONE NUMBER:	
PPC EMAIL ADDRESS:	
APPLICANT CERTIFICATION	
"I certify by my signature below that my organization possesses ALL of the following:	
A. Knowledge of the state and federal Earned Income Tax Credit (EITC) and Volunteer Income Tax Assistance (VITA) program;	
B. Three (3) years of experience successfully providing, coordinating and implementing education and outreach activities that serve low-income populations;	
C. The ability to provide education and outreach activities appropriate to the language and culture of the targeted population;	
D. The ability to collect and report reliable and valid data for all proposed activities; and	
E. Entity is in good standing with federal and state administering grant issuing agencies	
AUTHORIZED INDIVIDUAL'S NAME, TITLE & SIGNATURE	NAME: TITLE: WRITTEN SIGNATURE: _____ DATE: _____

Scored Documents

Document Title	Total Possible Points
Application Narrative Template (CSD171ANT)	55
	10 (Possible Preference Points)
Scope of Work (CSD 171)	45
Total	110

Application Narrative Template (CSD 171ANT)

- Past-Experience (20 Points)
- Organizational Capacity (25 Points)
- Trusted Community Partners (10 Points)
- Past EITC Activities (5 Preference Points)
- Other Languages (5 Preference Points)

Application Narrative Template

State of California
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT
Cal EITC Outreach and Education Application Narrative Template
CSD 171ANT (Rev. 7/12/17)

Cal EITC Education and Outreach Grant Application Narrative Template

PAST EXPERIENCE CONDUCTING EDUCATION AND OUTREACH (20 POINTS)

NOTE: 20 Page max limit begins from this page forward

Use this section to present a detailed description of your organization's experience. **Applicant must clearly address each point below.**

Applicant Must Include in its Narrative the Following:

- Past experience conducting similar education and outreach activities to low-income in the specified Target Area for which you are applying. A minimum of 3 years of experience is required;
- Past education and outreach campaigns conducted in the proposed target area in appropriate languages; and
- Operational readiness and expertise in conducting, budgeting, and implementing similar scale education and outreach activities.

Enter narrative response here. (Text box will expand as narrative is entered)

Delete this text and type narrative

Application Narrative Template

ORGANIZATIONAL CAPACITY FOR CAL EITC EDUCATION AND OUTREACH ACTIVITIES (25 POINTS)

Applicant must clearly address each point below.

Applicant Must Include in its Narrative the Following:

- Description of the geographic area(s) to be targeted, including:
 - county;
 - zip code,
 - city/neighborhood (if available),
 - rural or urban
 - other identifying targeting information
- Service delivery strategy to be used to deliver education and outreach activities
- Why the type(s) of outreach activities applicant chose are determined to be the best most effective method for reaching the proposed area/population to be served;
- Efforts that will be made to ensure proposed education and outreach activities are reaching:
 - Culturally diverse low-income eligible populations in multiple languages;
 - Self-employed workers newly eligible for the Cal EITC
 - Workers with incomes up to \$22,300 newly eligible for the Cal EITC
 - Californians whose low income does not require them to file taxes
 - Californians who have never claimed EITC, regardless of whether filed taxes previously
- Expertise, staffing, partnerships, etc. that will help in the delivery of the projected activities
- Activities that will be designed to help connect people with local VITA sites and/or other resources (e.g., <https://www.eitc.irs.gov/>) making it convenient, easy and accessible for people to claim the credit; and
- How data will be collected monthly to ensure accurate and timely submission of outcomes and expenditures.

Enter narrative response here (Text box will expand as narrative is entered)

Delete this text and type narrative

Application Narrative Template

TRUSTED COMMUNITY PARTNERS (10 POINTS)

Use this table to present detailed information on trusted community partners to be engaged who will help deliver successful education and outreach activities. Community partners differ from subcontractors in that, for the purpose of this NOFA, they are unfunded collaborative and community-based-organizations that have a positive, past working relationship with applicants. Applicants should detail efforts involving public benefits agencies as well as public and private faith-based, schools, social services program, veteran, and disability entities. Rows may be added/deleted as necessary.

Required Content:

- Names and location of community partner(s) to be engaged;
- Purpose of the community partner; and
- Description of how the partner will help the applicant achieve the projected outcomes identified in the Scope of Work
- Efforts involving coordinating with public benefits agencies as well as public and private faith-based, school, social services program, veteran, and disability entities

COMMUNITY PARTNER NAME AND LOCATION	ORGANIZATION PURPOSE	DESCRIPTION OF HOW PARTNER WILL HELP

Application Narrative Template

PAST ACTIVITIES CONDUCTING EITC EDUCATION AND OUTREACH (5 PREFERENCE POINTS)

If your organization has experience conducting EITC specific education and outreach, including the VITA program you must provide data (i.e., number of people reached, number of outreach events held, etc.) on past accomplishments demonstrating success spanning 1-3 years.¹ Include data on past accomplishments using the table provided for each calendar year. If you did not conduct outreach under any of the provided activities, write "N/A".

EITC Outreach Type	Activity Detail	Past Calendar Years Performance Outcomes		
		2015	2016	2017
Web				
Social Media				
Canvassing	Door-To-Door Canvassing in Folsom, Elk Grove, and city of Sacramento	500	1,500	1,750
Media				
Collateral Messaging				
Group Events				
Other				

Application Narrative Template

LANGUAGES OTHER THAN ENGLISH AND SPANISH (5 PREFERENCE POINTS)

Use this section to present a detailed description of what outreach activities will be conducted in languages other than English and Spanish.

Enter narrative response here (Text box will expand as narrative is entered)

Delete this text and type narrative

Scope of Work

Outreach Activity
Web
Social Media
Canvassing
Media
Collateral Messaging
Group Events
Other 1:
Other 2:

- No page limit
- Use whole numbers for the Projections
- Indicate “n/a” if not conducting that particular activity
- Follow the definitions and instructions indicated in the “Scope of Work Instructions” tab

Scope of Work

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT Cal EITC Education and Outreach Scope of Work CSD 171 (Rev. 7/12/17)			
2017 CAL EITC EDUCATION AND OUTREACH SCOPE OF WORK			
Organization Name:	Example Organization	Representative	John Doe
Telephone Number:	(55) 555-5555	Email Address:	john.doe@example.org
Target Area (County):		6-Sacramento	
Requested Amount:		\$90,000	
Projected Cal EITC Education and Outreach Activities			
Purpose: Below is a summary over the life of the grant of various education and outreach activities to be performed. Enter the metrics for each category and then detail the activities to be conducted. Refer to the "Scope of Work Instructions" for definitions and instructions of each category and how to interpret what each projection metric represents.			
Outreach Activity	Category	Projection (#)	
Web	EITC Website Hits	207,761	
Description of Activities To Be Conducted			
Type Text here			
Web - Definitions and Instructions			
EITC Website Hits: Provide number of visits to a web page fully dedicated to Cal EITC. Note this is not website hits to organization's main page.			
Description of Activities To Be Conducted This narrative must cover the following (in this order):			
1) Summary of updates that will be made to the website during the life of the grant.			
2) A listing of website updates that that will occur, who they will target, and where.			
3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."			
4) Any other additional information pertinent to work that will be conducted in relation to web presence. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).			

Scope of Work

Outreach Activity	Category	Projection (#)
Social Media	Number of Facebook Posts	
	Number of Twitter Posts	
	Number of Other Posts (Instagram, etc.)	
Description of Activities To Be Conducted		
Type Text here		
Social Media - Definitions and Instructions		
<p>Number of Facebook, Twitter, Other Posts: Provide the total number of social media posts to be conducted during the life of the grant.</p> <p>Description of Activities To Be Conducted: This narrative must cover the following (in this order):</p> <p>1) Detail the various avenues through which you will conduct social media posts, including which platform(s) (Facebook, Twitter, Instagram, etc.). Explain how you will accurately determine which messaging will resonate with eligible Californians, including adoption of messaging created by statewide grantees</p> <p>2) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."</p> <p>3) Indicate leveraging of other resources in regards to social media. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).</p>		

Scope of Work

Outreach Activity	Category	Projection (#)
Canvassing	Interactions	
	Number of Individuals who Receive Targeted Text Messages	
Description of Activities To Be Conducted		
Type Text here		
Canvassing - Definitions and Instructions Interactions: Provide the total number of conversations that will take place over the life of the grant. Note that these are interactions, not individuals reached. For example, if while canvassing the canvasser speaks to more than one household resident, this is counted as "1" interaction. Indicate total number of interactions here. Number of Individuals who Receive Targeted Text Messages: Provide the number of individuals that will be reached using targeted text messaging. For example, you send out two texts to the same group of 50,000 people. You would enter "50,000" people into this cell. Indicate total number of texts here. Description of Activities To Be Conducted: This narrative must cover the following (in this order): 1) Provide details of canvassing expected for the targeted zip codes in the target area. Outline by zip-code, providing projected metrics for each targeted zip-code indicated in <i>Appendix I: Maps of Target Areas 1-11</i> 2) Provide details of canvassing for non-targeted zip codes and specifically why canvassing needed there. A full listing of all zip-codes not necessary here. 3) Please detail the various messaging for the texts that will be sent out during the life of the grant. Also provide detail on how the numbers will be procured in order to send the texts. 4) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian." 5) Any other additional information pertinent to work that will be conducted during the life of the grant in relation to canvassing, including indicating any leveraging of other resources conducted this month. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).		

Scope of Work

Outreach Activity	Category	Projection (#)
Media	Impressions of Printed Ads	
	Impressions of Paid Radio Ads	
	Impressions of Radio PSAs	
	Impressions of Paid T.V. Ads	
	Impressions of Television PSAs	
	Impressions for Billboards	
	Impressions from Transit Ads	
	Impressions from Internet/Website Ads	
	Impressions from Social Media Promoted/Boosted Ads	
Description of Activities To Be Conducted		
Type Text here		
Media - Definitions and Instructions <p>Impressions Definition: Calculated impressions based on total unique visits/views per month. In other words, what is the estimated unduplicated count of the particular media outreach for the life of the grant? For example, a transit ad may run for four weeks during a month and have a reach of 80,000. Realistically, however, the same people view that ad every week, so the impressions from that transit ad are realistically 20,000. Another example is that a radio ad is played on a station with a reach of 1,500,000 people a month. The radio ad which ran only twenty times that month, however, has a more realistic impression of 50,000. Most vendors will provide these realistic impressions as part of agreement with grantee.</p> <p>Impressions of Printed, Paid Radio, Radio PSAs, Paid T.V. Ads, Television PSAs, Billboards, Transit, Internet/Website, and Social Media/Boosted Ads: Indicate number of projected impressions for the various ads. Indicate total number of impressions here.</p> <p>Description of Activities To Be Conducted This narrative must cover the following (in this order):</p> <ol style="list-style-type: none"> 1) For each type of advertisement, please detail why it would be effective in the indicated target area and how ads will be managed. In regards to each type of ad, indicated how applicants will provide CSD monthly a breakdown of each advertisement's impressions. 2) Provide details for any local press event(s) expected and whether applicant will seek to obtain print/online, radio, or television coverage of the event(s). 3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian." 4) Indicate leveraging of other resources in regards to media. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet). 		

Scope of Work

Outreach Activity	Category	Projection (#)
Collateral Messaging	Flyers/Brochures Distributed	
	Posters Distributed	
	Number of Individuals who Receive Direct Mailers	
	Number of Individuals who Receive Targeted Emails	
	Number of People Who Receive Newsletters	
Description of Activities To Be Conducted		
Type Text here		
Collateral Messaging - Definitions and Instructions Flyers/Brochures Distributed: Provide the total number of brochures/flyers that will make their way to eligible Californians. This can include, but is not limited to: handing out flyers at the end of an event, flyers given out to people who enter a career-center, brochures disseminated to school children to bring home to their parents, etc. Do not include, however, brochures given to partners or left at places like coffee shops. Please detail those efforts in the narrative, but do not add them as a projection. Posters Distributed: Provide the total number of posters put up in places where eligible Californians will see them. In the narrative list the probable locations of the posters. Indicate total number of posters here. Number of Individuals who Receive Direct Mailers: Provide the number people who will receive a direct mailer. Indicate total number of direct mailers here. Number of Individuals who Receive Targeted Emails: Provide the number of new emails who will receive information about Cal EITC. Grantee should work to ensure that each email actually represents an individual (For example, if I receive an email in my work email and my personal email, I would be counted as "1" even though I received 2 emails). Indicate total number of emails here. Number of People Who Receive Newsletters: Provide the number new people who will receive a newsletter during the life of the grant. Description of Activities To Be Conducted - This narrative must cover the following (in this order): 1) Broad overview of flyer/brochure and/or poster distribution, including leveraging of any resources. Overview should match metrics listed above. 2) Listing of direct mailers that will be sent out. Overview should match total listed above. 3) Provide an estimate of total number of individuals reached via email. Include total number of planned new emails to be added each month, the projected number of people who will receive multiple emails during the life of the grant, and how the applicant will report this information monthly to CSD. 4) Provide details about each expected newsletter and how it will reach eligible Californians. 5) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian." 6) Any other additional information pertinent to work conducted during the month in relation to complimentary messaging, including indicating any leveraging of other resources. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).		

Scope of Work

Outreach Activity	Category	Projection (#)
Group Events	Number of Events	
Description of Activities To Be Conducted		
Type Text here		
Group Events - Definitions and Instructions Number of Events: Provide the total number of Group Events that will take place. Description of Activities To Be Conducted - This narrative must cover the following (in this order): 1) Provide details of group events expected for the targeted zip codes in the target area. Outline by zip-code, providing projected metrics for each targeted zip-code indicated in Appendix I: Maps of Target Areas 1-11. 2) Provide details of group events for non-targeted zip codes and specifically why group events needed there. A full listing of all zip-codes not necessary here. 3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian." 4) Any other additional information pertinent to work conducted during the month in relation to group events, including indicating any leveraging of other resources. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).		

Scope of Work

Outreach Activity	Category	Projection (#)
Other 1		
Description of Activities To Be Conducted		
Type Text here		

Outreach Activity	Category	Projection (#)
Other 2		
Description of Activities To Be Conducted		
Type Text here		

Other 1 - Definitions and Instructions
<p>Directions: Provide clear and concise definitions for outreach activity "other."</p> <p>Outreach Activity "Other 1" Name:</p> <p>Outreach Activity "Other 1" Category:</p> <p>Category Projection Definition:</p> <p>Definition of "Description of Activities To Be Conducted" (Provide order to match narrative in Scope of Work)</p> <p>1)</p> <p>2)</p> <p>3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."</p>
Other 2 - Definitions and Instructions
<p>Directions: Provide clear and concise definitions for outreach activity "other."</p> <p>Outreach Activity "Other 1" Name:</p> <p>Outreach Activity "Other 1" Category:</p> <p>Category Projection Definition:</p> <p>Definition of "Description of Activities To Be Conducted" (Provide order to match narrative in Scope of Work)</p> <p>1)</p> <p>2)</p> <p>3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."</p>

Budget Summary

<small>State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT Cal EITC Outreach and Education Budget Summary CSD 171A (Rev. 07/12/17)</small>		
CAL EITC EDUCATION AND OUTREACH CONTRACT BUDGET SUMMARY		
Organization Name:	Example Organization	Representative: John Doe
Telephone #:	(55) 555-5555	E-mail Address: john.doe@example.org
Target Area (County):		6-Sacramento
Requested Amount:		\$90,000.00
Education and Outreach Activities		
Line Item		Projected Expenditures (rounded to the nearest dollar)
1	Web	
2	Social Media	
3	Canvassing	
4	Media	
5	Collateral Messaging	
6	Group Events	
7	Other 1:	
8	Other 2:	
Total Budget Amount (Sum of Line Items 1-8)		
Note: Total Must Match Requested Amount		

Budget Detail

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT CAL EITC Education and Outreach Budget Detail CSD 171B (Rev. 07/12/17)				
CAL EITC EDUCATION AND OUTREACH BUDGET DETAIL				
Organization Name:	Example Organization		Representative:	John Doe
Telephone #:	(555) 555-5555		Email Address:	john.doe@example.org
Target Area (County):			6-Sacramento	
Requested Amount:			\$90,000.00	
Education and Outreach Activities				
Note: Add/delete rows as needed to the bottom of each activity expenditure category.				
Activity - Expenditure	Detail	Cost	New or Expansion	Explanation
Web				
Example: Web Posting	Design and implementation	\$3,000	New	
Example: Website development	Web banners design (\$100/hour x 40 hours)	\$4,000	Expansion	Previously funded through campaign contributions; funding no longer available

[illegible]

Timeline

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT CalEITC Education and Outreach Timeline CSD 171TL (Rev. 7/26/17)		<table border="1"> <tr> <td>Organization Name</td> <td>Example Organization</td> </tr> <tr> <td>Target Area (County):</td> <td>6-Sacramento</td> </tr> </table>		Organization Name	Example Organization	Target Area (County):	6-Sacramento		
Organization Name	Example Organization								
Target Area (County):	6-Sacramento								
CAL EITC EDUCATION AND OUTREACH TIMELINE Use this Timeline to include a brief description of Education and Outreach activities to be completed in the corresponding month. Activities must correspond to activities indicated in the Scope of Work (CSD 171). You may add or delete extra space to each									
Outreach Activity	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18	
Web									
Social Media	Develop and Finalize social media outreach calendar posts for Facebook, Twitter, and Instagram	Social media content calendar in place; 5 Social Media Posts (2 FB, 2 Twitter, 1 Instagram); December social media toolkit	Social media posts= 5 (2 FB, 2 Twitter, 1 Instagram); January social media toolkit	Social media posts = 20 (10 FB, 8 Twitter, 2 Instagram); February social media toolkit	Social media posts = 25 (12 FB, 10 Twitter, 3 Instagram, 2 YouTube); March social media toolkit	Social media posts = 25 (25 FB, 10 Twitter); April social media toolkit	Social media posts =25 (10 FB, 13 Twitter, 2 Instagram)	Post follow-up messages to Facebook and Twitter to Collect additional success stories	
Canvassing									
Media									
Collateral Messaging									
Group Events									
Other 1:									
Other 2:									

Matching Funds

State of California	Organization Name	Example Organization
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT	Target Area (County)	6-Sacramento
CAL EITC Education and Outreach Matching Funds	Requested Amount	\$90,000
CSD 171MF (Rev. 07/12/17)		

Matching Funds Worksheet

The Matching Funds Worksheet is not a scored element of the application but it is required

Applications must reflect at least 50% cost sharing or match of all funds requested. Matching funds can be in the form of "in-kind" contributions or volunteer hours. The Bureau of Labor Statistics Occupational Employment Statistics program provides employment and wage estimates. These estimates for which certain occupations and wages are provided may be used to calculate in-kind/volunteer contributions. Occupation and wage estimates can be found at http://www.bls.gov/oes/current/naics4_541200.htm. In addition, organizations can consider utilizing their overhead/administrative costs as matching funds. For example, if \$90,000 in grant funds is requested, provide matching funds or activities of at least \$45,000. You may add/delete rows as needed. An example is provided for reference. Cash matching funds must be secured on or before the start of the contract term. In-kind match and/or volunteer hours should also be secured and verifiable by the start of the contract.

Item	Computation	Matching Funds Source	Matching Funds
Example: Laptops	3 laptops X \$1,000 each = \$3,000	ABC Funding	\$1,000.00
Total Matching Funds (Must be 50% of Requested Amount)			\$1,000.00

Subcontractor Information

State of California		Organization Name	Example Organization
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT		Target Area	6-Sacramento
CAL EITC Education and Outreach Subcontractor Information		Requested Amount	\$90,000.00
CSD 171SI (Rev. 07/12/17)			
<u>Subcontractor Information Worksheet</u>			
Subcontractor Information Worksheet is not a scored element of the application but is required.			
Use this spreadsheet to provide information on each planned subcontract. The use of any planned subcontractor(s) must be fully explained here. Awarded applicants will be expected to update this spreadsheet with funding amounts. Selected applicants and their subcontractors are subject to all state laws and regulations. Applicants may expand rows on this worksheet if more room is needed per planned subcontractor.			
Organization	Contact Name	Brief Description of Activities	

References

State of California	Organization Name		Example Organization
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT	Target Area		6-Sacramento
CAL EITC Education and Outreach References Worksheet	Requested Amount		\$90,000.00
CSD 171Ref (Rev. 07/26/17)			

References Worksheet			
The References Worksheet is not a scored element of the application but it is required			
Applicants are required to submit three references with submission of the application. References should be from organizations that are familiar with the applicant's qualifications, experience and past performance on education and outreach related work. For this NOFA, applicants may not list CSD or Franchise Tax Board as a reference. Applicants must include the referring organization's name, contact information, affiliation to the applicant, and a brief recap of their experience with the applicant. References are not a scored component of the application, but a required attachment.			
Applicant Name			
Requested Amount (\$)			
	Reference 1	Reference 2	Reference 3
Full Name			
Title			
Organization			
Phone			
Email			
Address			
Affiliation to Applicant			
Recap of Experience with Applicant			

Payee Data Record

1	INSTRUCTIONS: Complete all information on this form. Sign, date, and return to the State agency (department/office) address shown at the bottom of this page. Prompt return of this fully completed form will prevent delays when processing payments. Information provided in this form will be used by State agencies to prepare Information Returns (1099). See reverse side for more information and Privacy Statement. NOTE: Governmental entities, federal, State, and local (including school districts), are not required to submit this form.								
2	PAYEE'S LEGAL BUSINESS NAME (Type or Print) _____ <hr/> <table style="width: 100%;"> <tr> <td style="width: 50%;">SOLE PROPRIETOR – ENTER NAME AS SHOWN ON SSN (Last, First, M.I.)</td> <td style="width: 50%;">E-MAIL ADDRESS</td> </tr> <tr> <td>MAILING ADDRESS</td> <td>BUSINESS ADDRESS</td> </tr> <tr> <td>CITY, STATE, ZIP CODE</td> <td>CITY, STATE, ZIP CODE</td> </tr> </table>			SOLE PROPRIETOR – ENTER NAME AS SHOWN ON SSN (Last, First, M.I.)	E-MAIL ADDRESS	MAILING ADDRESS	BUSINESS ADDRESS	CITY, STATE, ZIP CODE	CITY, STATE, ZIP CODE
SOLE PROPRIETOR – ENTER NAME AS SHOWN ON SSN (Last, First, M.I.)	E-MAIL ADDRESS								
MAILING ADDRESS	BUSINESS ADDRESS								
CITY, STATE, ZIP CODE	CITY, STATE, ZIP CODE								
3 PAYEE ENTITY TYPE CHECK ONE BOX ONLY	ENTER FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN): - 		NOTE: Payment will not be processed without an accompanying taxpayer I.D. number.						
<table style="width: 100%;"> <tr> <td style="width: 30%; vertical-align: top;"> <input type="checkbox"/> PARTNERSHIP <input type="checkbox"/> ESTATE OR TRUST <input type="checkbox"/> INDIVIDUAL OR SOLE PROPRIETOR ENTER SOCIAL SECURITY NUMBER: - </td> <td style="width: 70%; vertical-align: top;"> CORPORATION: <input type="checkbox"/> MEDICAL (e.g., dentistry, psychotherapy, chiropractic, etc.) <input type="checkbox"/> LEGAL (e.g., attorney services) <input type="checkbox"/> EXEMPT (nonprofit) <input type="checkbox"/> ALL OTHERS </td> </tr> </table>		<input type="checkbox"/> PARTNERSHIP <input type="checkbox"/> ESTATE OR TRUST <input type="checkbox"/> INDIVIDUAL OR SOLE PROPRIETOR ENTER SOCIAL SECURITY NUMBER: - 		CORPORATION: <input type="checkbox"/> MEDICAL (e.g., dentistry, psychotherapy, chiropractic, etc.) <input type="checkbox"/> LEGAL (e.g., attorney services) <input type="checkbox"/> EXEMPT (nonprofit) <input type="checkbox"/> ALL OTHERS					
<input type="checkbox"/> PARTNERSHIP <input type="checkbox"/> ESTATE OR TRUST <input type="checkbox"/> INDIVIDUAL OR SOLE PROPRIETOR ENTER SOCIAL SECURITY NUMBER: - 	CORPORATION: <input type="checkbox"/> MEDICAL (e.g., dentistry, psychotherapy, chiropractic, etc.) <input type="checkbox"/> LEGAL (e.g., attorney services) <input type="checkbox"/> EXEMPT (nonprofit) <input type="checkbox"/> ALL OTHERS								
4 PAYEE RESIDENCY STATUS	<input type="checkbox"/> California resident - Qualified to do business in California or maintains a permanent place of business in California. <input type="checkbox"/> California nonresident (see reverse side) - Payments to nonresidents for services may be subject to State income tax withholding. <input type="checkbox"/> No services performed in California. <input type="checkbox"/> Copy of Franchise Tax Board waiver of State withholding attached.								
5	I hereby certify under penalty of perjury that the information provided on this document is true and correct. Should my residency status change, I will promptly notify the State agency below. <hr/> <table style="width: 100%;"> <tr> <td style="width: 60%;">AUTHORIZED PAYEE REPRESENTATIVE'S NAME (Type or Print)</td> <td style="width: 40%;">TITLE</td> </tr> <tr> <td>SIGNATURE</td> <td>DATE</td> </tr> <tr> <td></td> <td>TELEPHONE</td> </tr> </table>			AUTHORIZED PAYEE REPRESENTATIVE'S NAME (Type or Print)	TITLE	SIGNATURE	DATE		TELEPHONE
AUTHORIZED PAYEE REPRESENTATIVE'S NAME (Type or Print)	TITLE								
SIGNATURE	DATE								
	TELEPHONE								
6	Please return completed form to: Department/Office: <u>Community Services & Development</u> Unit/Section: <u>Accounting Unit</u> Mailing Address: <u>2389 Gateway Oaks Drive# 100</u> City/State/Zip: <u>Sacramento, CA 95833</u> Telephone: <u>(916) 576-5308</u> Fax: <u>()</u> E-mail Address: <u>Luz.Lunetta@csd.ca.gov</u>								

Contractor Certification Clauses

CCC 04/2017

CERTIFICATION

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective Contractor to the clause(s) listed below. This certification is made under the laws of the State of California.

<i>Contractor/Bidder Firm Name (Printed)</i>		<i>Federal ID Number</i>
<i>By (Authorized Signature)</i>		
<i>Printed Name and Title of Person Signing</i>		
<i>Date Executed</i>	<i>Executed in the County of</i>	

Q & A

Review Process

Phase 1: Application Pass/Fail Review

- One (1) original single-sided application package plus four (4) exact copies (Use a paper or binder clip to bind each of the packets – do not staple any parts of the application or attachments);
- One CD ROM or Flash Drive with an electronic copy of all application documents (in PDF format) is submitted;
- The requested funding is within the funding limits;
- All application documents from the table above (1-10) have been completed and included with the application;
- Every document includes full contact information and applicable signatures; and
- Late applications will be rejected and will not be considered for funding.

Where in NOFA: Pages 14-15

What Link on Contracting Opportunities Webpage: Instructions Document List

Review Process

Phase 2: Evaluation (Scoring)

Document Title	Total Possible Points
Application Narrative Template (CSD171ANT)	55
	10 (Possible Preference Points)
Scope of Work (CSD 171)	45
Total	110

Projected Timeline

Activity	Dates
NOFA Released	August 8, 2017
Bidders Conference	August 15, 2017
Deadline for Submitting Questions	August 21, 2017
Notice of Intent to Apply	August 22, 2017
Questions & Answers Posted on CSD Public Website	August 24, 2017
Applications Due	August 31, 2017
Notice of Awardees Posted	September 25, 2017
Contracts Mailed to Awardees	September 26, 2017
Contracts Due Back to CSD	October 9, 2017
Contract Term	October 10, 2017 through May 31, 2018

Questions

1. *Appendix III. Frequently Asked Questions*
2. Two Ways to Submit Additional Questions:
 - Captured and recorded today on the webinar
 - Email questions to CSBGDIV@csd.ca.gov using the subject line: Questions on 2017 NOFA EITC

All questions and answers will be posted to the CSD website <http://www.csd.ca.gov/Resources/ContractingOpportunities.aspx> on August 24th.

Q & A

Thank You!